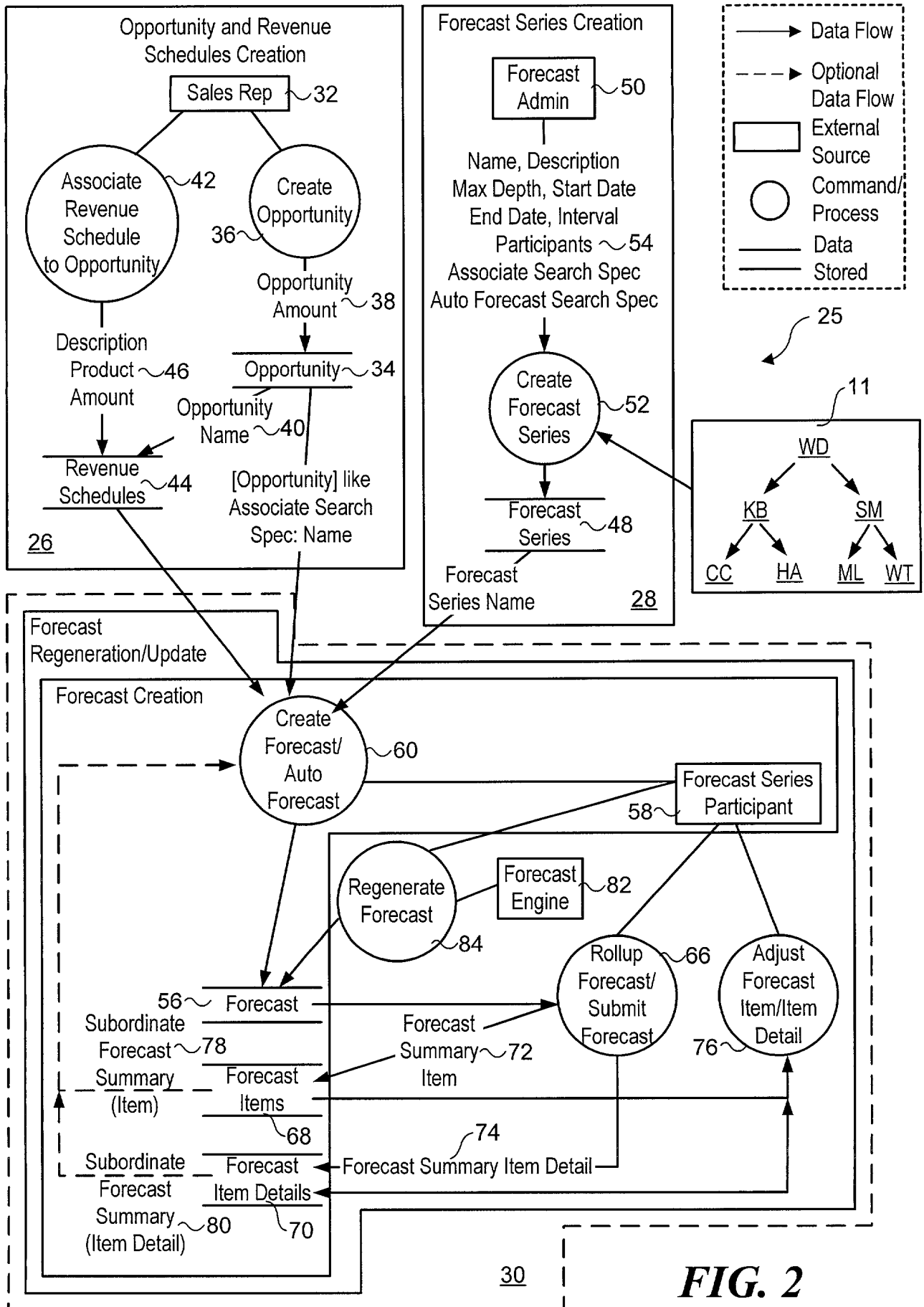


FIG. 1

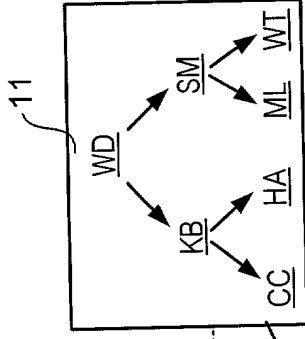


Creating Forecast Series

Forecast Admin 50

Name, Description, Start Date, End Date, Max Depth, Interval, Interval Period, View Mode
Base Period Type, Participants, Associate Search Spec, Auto Forecast Search Spec, 54

Create Forecast Series 52



86T

S_FCSTSER

Name	Start	End	Assoc. Search Spec	Auto Search Spec	View Mode
Series 1	1/1/00	12/1/00	[Opportunity] like 'Oppty Name_1'	[Opportunity] like 'Oppty Name_1'	Sales Rep
Series 2	1/1/00	1/31/00	[Opportunity] like 'Oppty Name_2'	[Opportunity] like 'Oppty Name_2'	Manager

FIG. 3

Forecast Participants

Last Name	First Name	Position	Position Type	Region	Division	Department	Rolls Up To
Conway	Chris	Call Center Rep, NY	Outbound Rep	Western	Telesales	Telesales	Walter Davis
Alacon	Hector	Field Sales Rep, NJ	Field Sales Rep	Eastern	Field Sales	Telesales	Kim Beale

FIG. 6A

Add Forecast Participants

Last Name	First Name	Position	Position Type	Region	Division	Department	Parent Pos	Manager
Conway	Chris	Call Center Rep, NY	Outbound Rep	Western	Telesales	Telesales	Mgr, Tele	Walter Davis
Alacon	Hector	Field Sales Rep, NJ	Field Sales Rep	Eastern	Field Sales	Telesales	Mgr, Field	Kim Beale

Add

New

Close

FIG. 6B

S_FCSTSER

86T

Series	Start Date	End Date	Base Period	Interval	Interval Period Type
Series 1	1/1/2000	12/1/2000	Month	7	Day

S_FCSTSER_DATE (from Forecast Series Date View

148T

Forecast Date	Start Date	End Date	History View Date	History Edit Date
1/1/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/8/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/15/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/22/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/29/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
2/5/2000	2/1/2000	1/29/2000	11/1/99	12/1/99

S_FCSTSER_POSTN (from Forecast Series Participants View)

150IT

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West
Conway	Chris	Manager-West	Manager-US
Alacon	Hector	Manager-US	Vice President

FIG. 7

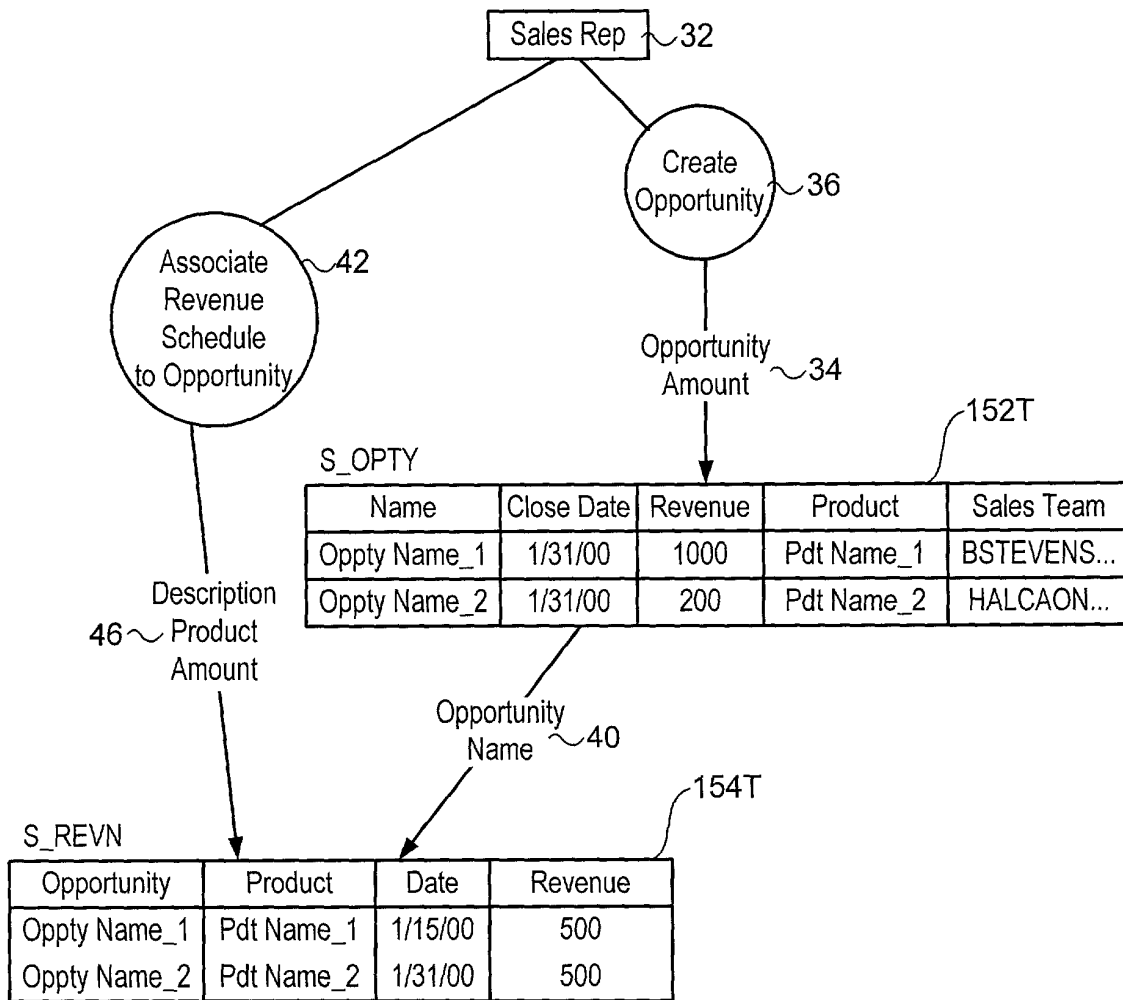


FIG. 8

FIG. 9 is a block diagram of a system architecture for generating a forecast. The system includes a database 150T, a user interface 154T, and a processing unit 160T. The database 150T stores forecast data, including a forecast series participant table 156T and a forecast data table 162T. The user interface 154T allows a user to interact with the system, and the processing unit 160T generates the forecast based on the data stored in the database 150T.

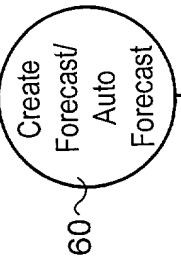
S_FCSTSER_POSTN

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West

Forecast Series Participant

58

150T



60

86T

S_FCSTSER

Name	Start	End	Assoc. Search Spec	Auto Search Spec	View Mode
Series 1	1/1/00	12/1/00	[Opportunity] like 'Oppty Name_1'	[Opportunity] like 'Oppty Name_1'	Sales Rep
Series 2	1/1/00	1/31/00	[Opportunity] like 'Oppty Name_2'	[Opportunity] like 'Oppty Name_2'	Manager

S_FCST

Series	Date
Series 1	Oppty Name-1

156T

S_REVN

Opportunity	Product	Date	Revenue
Oppty Name_1	Pdt Name_1	1/15/00	500
Oppty Name_2	Pdt Name_2	1/31/00	500

154T

S_FCST_ITEM

Date	Product	Opportunity
1/15/00	Pdt Name_1	Oppty Name_1
1/31/00	Pdt Name_2	Oppty Name_2

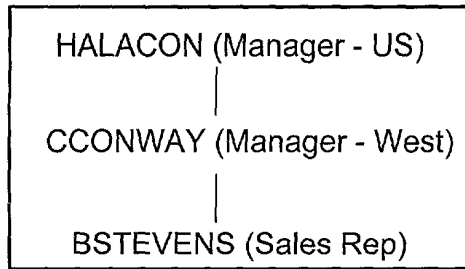
160T

S_FCST_ITEM_DTL

Date	Revenue
1/15/00	500
1/31/00	500

162T

FIG. 9



ORGANIZATION
HIERARCHY

FIG. 10

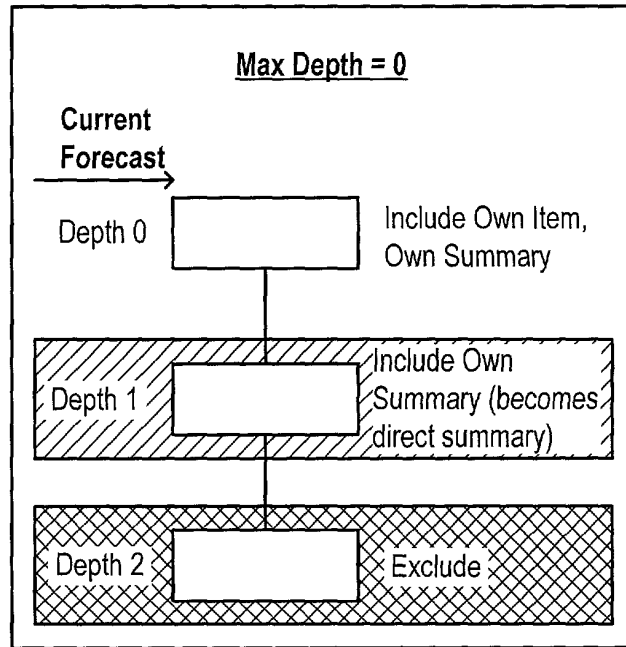


FIG. 11A

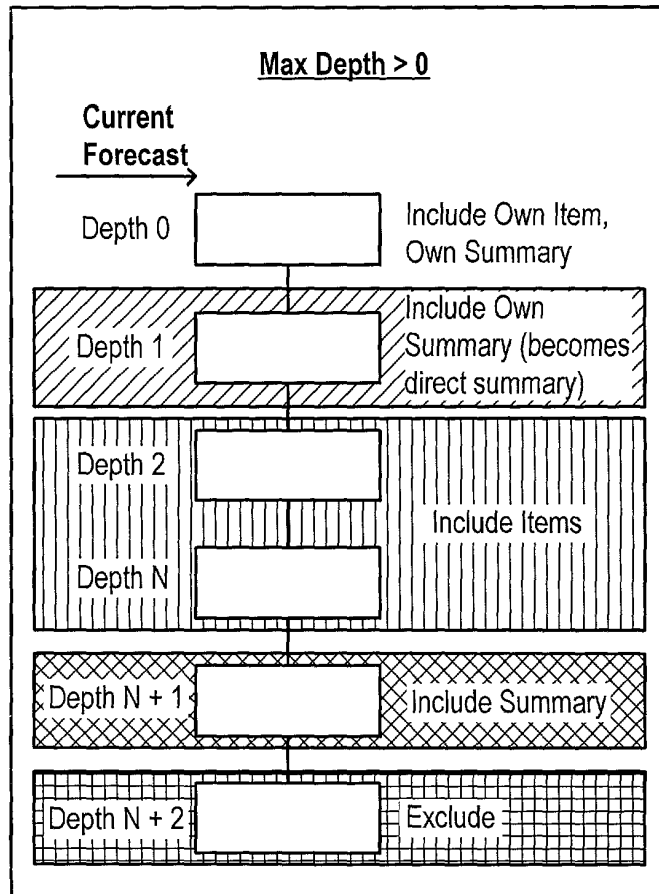


FIG. 11B

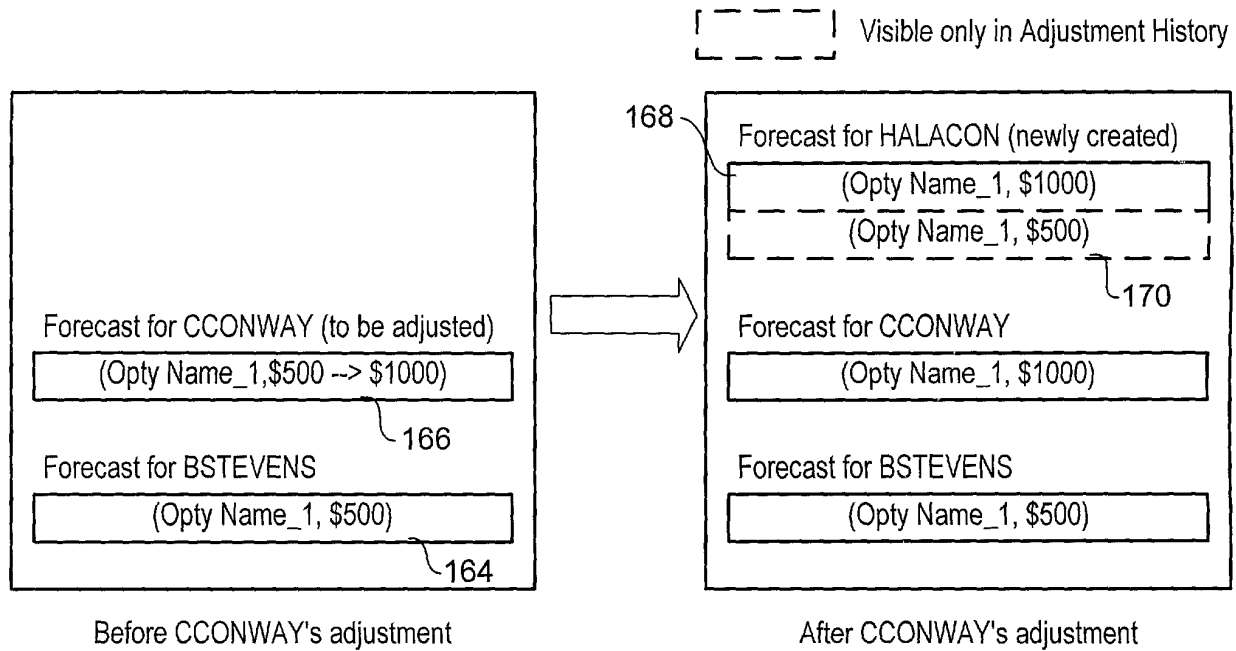


FIG. 12

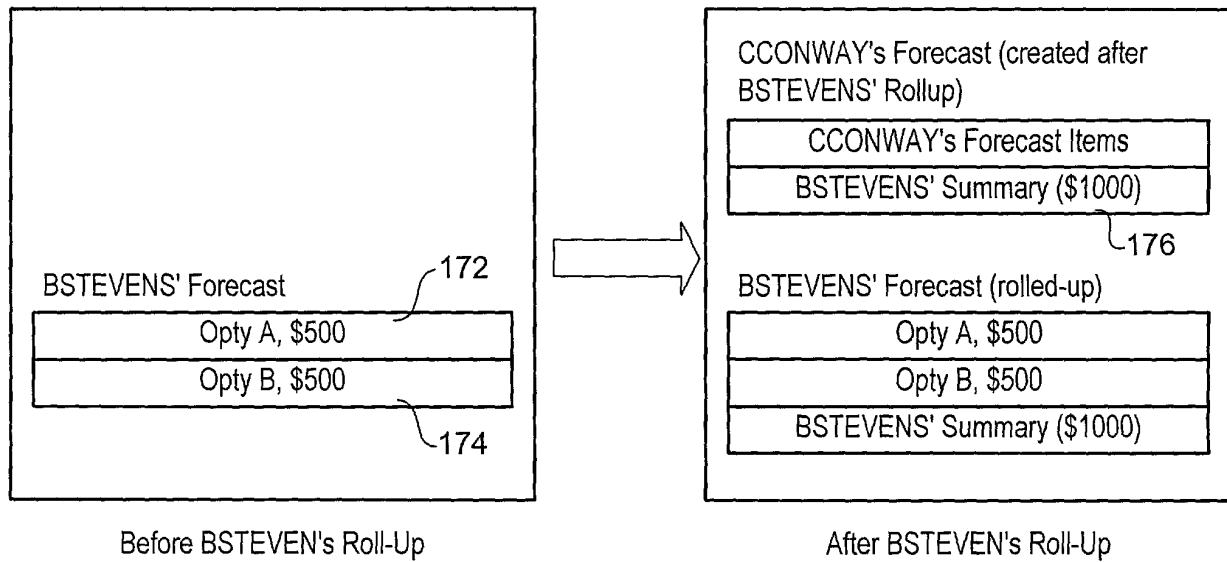
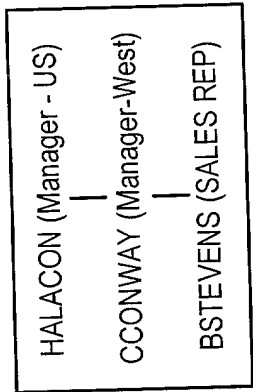


FIG. 13

FIG. 14 is a block diagram of an organization hierarchy. The diagram shows a hierarchy starting with HALACON (Manager - US) at the top, which branches into CCONWAY (Manager-West) and BSTEVENS (SALES REP). Below this, there are two main sections: 'Before HALACON's Regenerate Forecast' and 'After HALACON's Regenerate Forecast'. The 'Before' section shows forecast items for HALACON, CCONWAY, and BSTEVENS, with some items marked as deleted. The 'After' section shows the same hierarchy but with updated forecast items, reflecting the regeneration process.



Organization Hierarchy

[- - -] Deleted

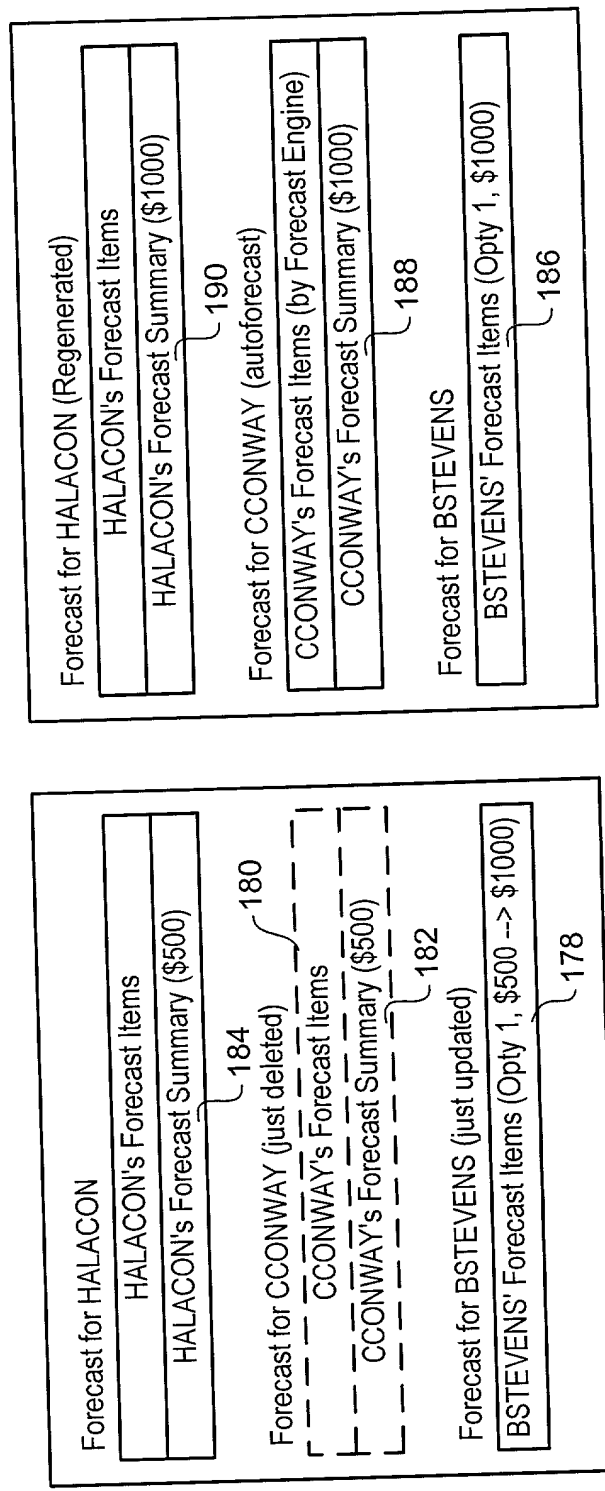


FIG. 14

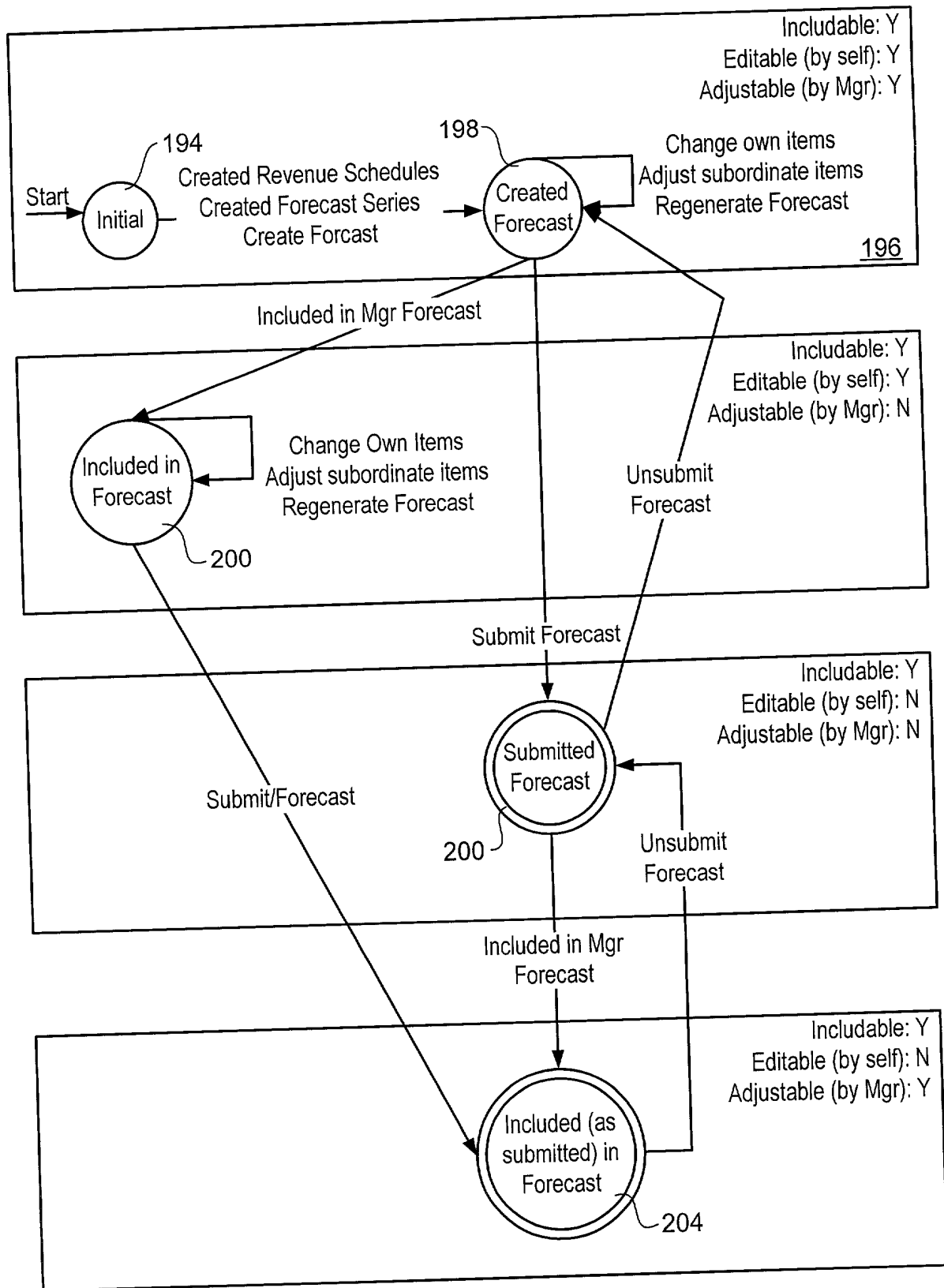


FIG. 15

-212

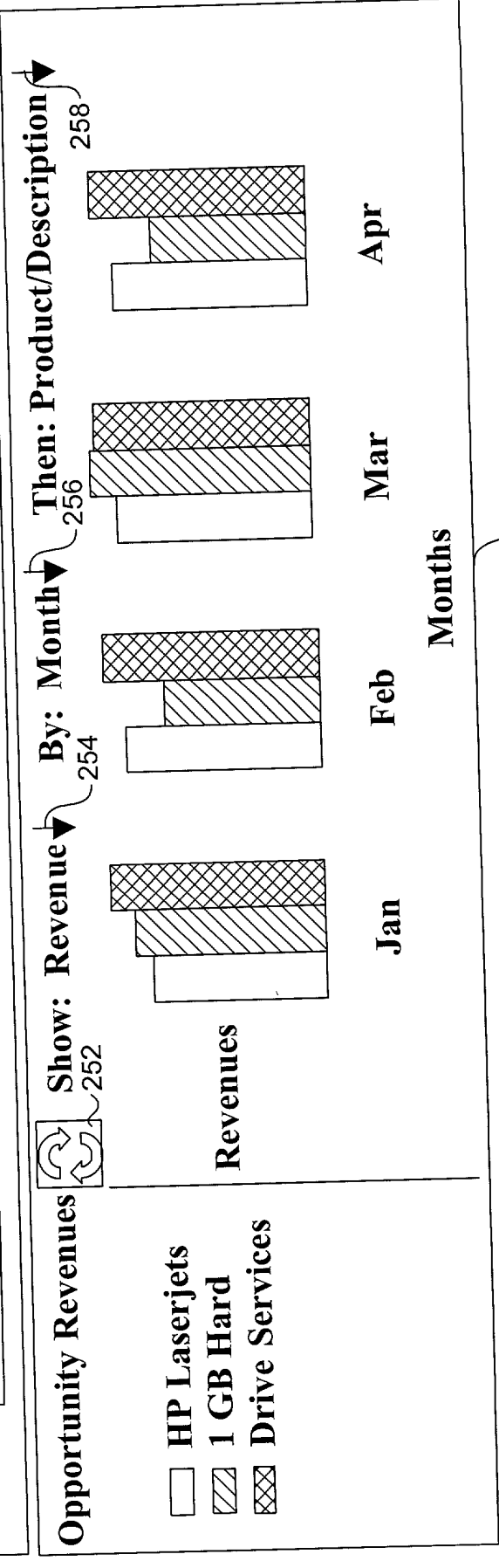
Account	A.K. Parker Inc., HQ	▼	Opportunity 216	275 Portables at A.K. Parker	Committed 222	232	234
Address	101 Main Street San Mateo, CA 94402 USA	...		Great opportunity for our ...		Revenue 224	\$850,000
			Description 220	High	Upside	\$125,000	238
			Lead Quality	Strategic Selling	Close Date	04/01/99	240
Source	ABC TV Ad	218	Methodology	03 - Qualification	Probability	50%	
			Sales Stage				

Opportunity Revenues		252		246		244		Update		Script		
Summary	Date	Descr	Product	Qty	Price	Revenue	Upside	Downside	Rev Class	Rev Type	Prob	Sales Rep
	1/1/99		1 GB Drive	10	\$250	\$2500			Closed		50%	HALACON
	2/1/99		1 GB Drive	50	\$200	\$10000			Commit		50%	CCONWA
✓	3/1/99		-	-	-	\$50,000	\$40,000		Expected	Bookings	60%	HALACON
	4/1/99	Install	-	-	-	\$1800					70%	HALACON
✓	5/1/99	Services	-	-	-	\$50,000	\$25,000	\$30,000	Upside	Billings	60%	CCONWA
	6/1/99		T1 Rental	5	\$10	\$3000					60%	CCONWA
	6/1/99		T1 Rental	5	\$15	\$4500					70%	HALACON
Totals				100		\$140,000	\$65,000	\$30,000				

FIG. 16

212

Account	A.K. Parker Inc., HQ	Opportunity	275 Portables at A.K. Parker	Committed	<input type="checkbox"/>
Address	101 Main Street San Mateo, CA 94402 USA	Description	Great opportunity for our ...	Revenue	\$850,000
Source	ABC TV Ad	Lead Quality	High	Upside	\$125,000
		Methodology	Strategic Selling	Close Date	04/01/99
		Sales Stage	03 - Qualification	Probability	50%



214A

210

FIG. 17

Revenue Schedule Wizard – Step 1 of 4 – Date Range

Start Date: 1/1/99 ▼ 264
End Date: 12/31/99 ▼ 266
Frequency: Month ▼ 268
No. of Periods: 12 ▼ 270

☒ Replace the existing revenue schedule items 272

Cancel

< Back

Next >

Finish

FIG. 18A

Revenue Schedule Wizard – Step 2 of 4 – Default Values

Account: A.K. Parker Inc. ▼ 278
Opportunity: 275 Portables ▼ 280
Contact: ▼ 282
Product: 1 GB Hard Drives ▼ 284
Product Line: Hardware ▼ 286
Revenue Class: Upside ▼ 288
Revenue Type: Telecommunications ▼ 290

Cancel

< Back

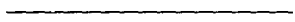

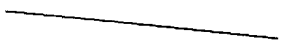

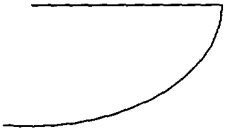

Next >

Finish

FIG. 18B

Revenue Schedule Wizard – Step 3 of 4 - Patterns

Patterns: 296 ~ ☐ Quantity 298 ~ ☒ Price 300 ~ ☐ Revenue

Straight Line  302	Increasing <input type="text" value="10%"/>  304	Decreasing <input type="text" value="5%"/> 314 (TYP)  306
Marginal Returns <input type="text" value="-10%"/>  308	Exponential <input type="text" value="10%"/>  310	Stepped <input type="text" value="-10%"/>  312

Select the appropriate revenue schedule patterns for Quantity, Price, and Revenue

Cancel

<Back

Next >

Finish

FIG. 18C

Revenue Schedule Wizard – Step 4 of 4 – Amounts

Starting Quantity:

Starting Price:

Starting Revenue:

Average Price:

Total Quantity:

Total Revenue:

\$250

3000

\$600,000

Cancel

<Back

Next >

Finish

FIG. 18D

FIG. 19 is a schematic diagram of a system for generating a revenue analysis report. The system includes a database 328, a processor 330, and a user interface 332. The database 328 stores data for various accounts, including Acme, AK Parker, and AG Edwards. The processor 330 generates a revenue analysis report based on the data stored in the database 328. The user interface 332 displays the report to the user.

328

Revenues

Flag	Summary	Date	Commit	Account	Opportunity	Description	Revenue	Rev Class	Prob	Sales Rep
✓		1/1/99		AK Park	275 Portables	Services	\$50,000	Bookings	50%	HALACON
✓		1/1/99	✓	AK Park	275 Portables	Hardware	\$65,000	Bookings	60%	HALACON
✓		1/1/99		AK Park	275 Portables	Networks	\$25,000		60%	HALACON
✓		1/1/99		AK Park	275 Portables	Services	\$35,000	Billings	50%	HALACON
✓		1/15/99	✓	Acme	Routers + Hub	Networks	\$65,000	Bookings	60%	HALACON
✓		1/15/99	✓	Acme	Routers + Hub	Install	\$90,000	Bookings	50%	HALACON
✓		1/15/99		Acme	Routers + Hub	Rollout	\$65,000		50%	HALACON

Revenue Analysis



Show: Revenues By: Month Then: Account

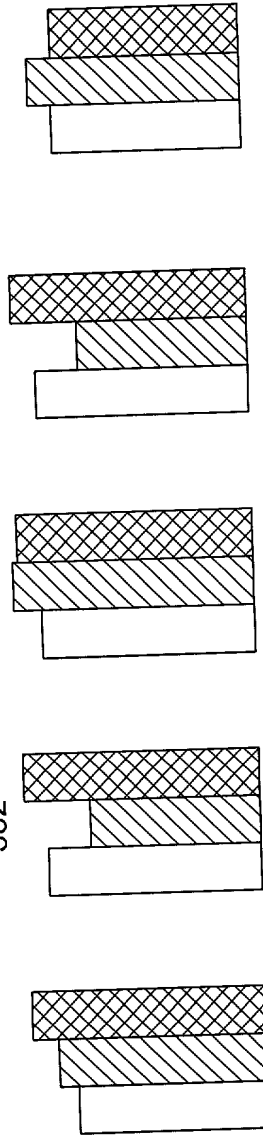
332

334

336

Acme
AK Parker
AG Edwards

Revenues



May

Apr

Mar

Feb

Jan

Months

326

330

FIG. 19

410

Forecasts

Series	Fest Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date	Revenue Amt
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99			\$1,000,000
Billings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	SADMIN	1/1/99	\$1,300,000
Bookings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	SADMIN	1/1/99	\$1,200,000
Billings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,700,000
Bookings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,500,000

Series	Billings	214	▼	Forecaster	KBEALE	418 Create Date	02/01/99	430	▼
Forecast Date	02/01/99	216	▼	Division	Sales	424 Created By	SADMIN	432	
Status	Active	220	▼	Position	NE Sales Rep3	426 Submit Date	02/01/99	434	▼
Revenue Amt	\$1,200,000	422		Position Type	Field Sales	Submitted By	SADMIN	436	

408

212

FIG. 20

438

Series	Billings	214	▼	Forecast	KBEALE	Create Date	02/01/99	430	▼
Forecast Date	02/01/99	216	▼	Division	Sales	Created By	SADMIN	432	▼
Status	Active	220	▼	Position	NE Sales Rep3	Submit Date	02/01/99	434	▼
Revenue Amt	\$1,200,000	422	▼	Position Type	Field Sales	Submitted By	SADMIN	436	▼

Show:

▼

442

GO



Forecast Line Items

Date	Fest	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin	Prob
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000			50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	\$30,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000				50%
1/1/99			AK Parker	275 Portables	Services	\$35,000				50%
1/15/99	✓	✓	Acme	Routers + Hub	Networks	\$65,000	\$45,000			60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000		\$15,000	\$45,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000			\$15,000	75%

440

FIG. 21

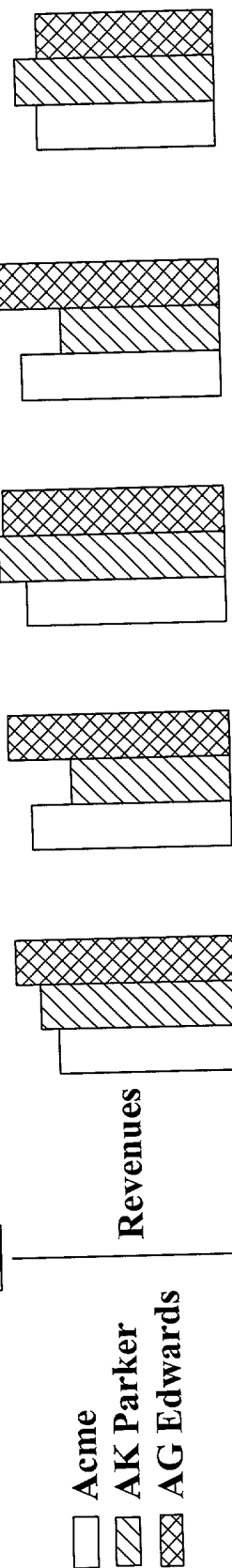
438

Series	Billings	214 ▼	Forecast	KBEALE	Create Date	02/01/99	430 ▼
Forecast Date	02/01/99	216 ▼	Division	Sales	Created By	SADMIN	432
Status	Active	220 ▼	Position	NE Sales Rep3	Submit Date	02/01/99	434 ▼
Revenue Amt	\$1,200,000	422	Position Type	Field Sales	Submitted By	SADMIN	436



Forecast Summary

Show: Revenues By: Month Then: Account



Acme

AK Parker

AG Edwards

Revenues

Jan

Feb

Mar

Apr

May

Months

444



437

FIG. 22

Forecasts

Series	Fcst Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99	KBEALE	1/1/99
Billings	01/01/99	In Process	KBEALE	KBEALE	01/01/99	SADMIN	1/1/98
Billings	12/01/98	In Process	KBEALE	SADMIN	12/01/98		



Forecast Comparison

Show: Revenues

By: Month

458

456

Revenues

- 02/01/99 Billings
- 01/01/99 Billings
- 12/01/98 Billings

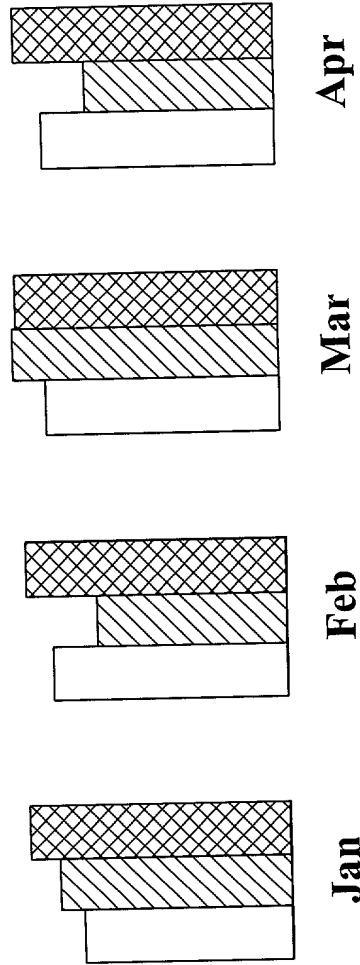


FIG. 23

462

464

Employees

☒ WDAVIS

☐ KBEALE

☐ HALACON

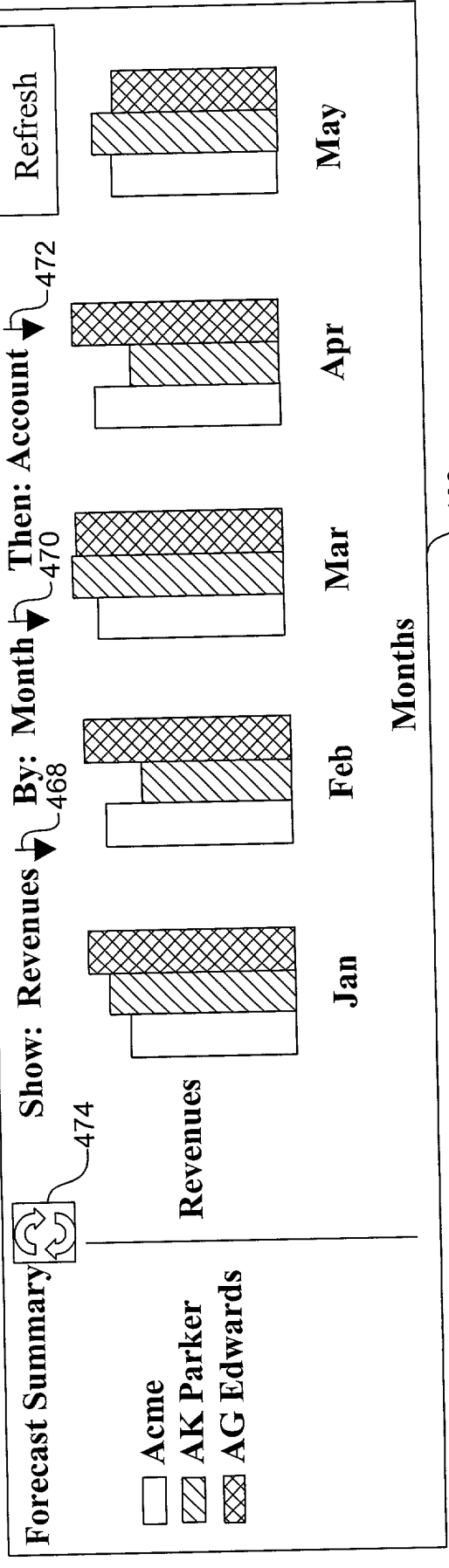
☐ CCONWAY

☐ SMILLER

☐ MLEMUR

☐ WTAKUDA

Employees		
Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NE
Hector Alacon	HALACON	Field Sales Rep, NJ
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA

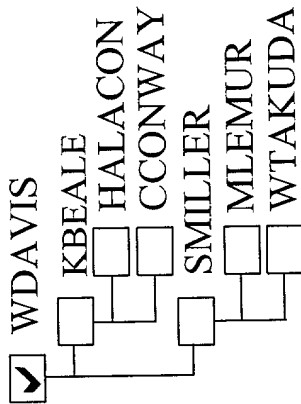


460

466

FIG. 24

Employees



Employees

Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NJ
Hector Alacon	HALACON	Field Sales Rep, NY
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA

Forecast Line Items



Date	Fest	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin	Prob
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000			50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	\$30,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000				50%
1/1/99			AK Parker	275 Portables	Services	\$35,000				50%
1/15/99	✓	✓	Acme	Routers + Hub	Networks	\$65,000	\$45,000			60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000			\$45,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000		\$15,000	\$15,000	75%

FIG. 25

FIG. 26

Revenues by Month, then by Account						
Account	Jan	Feb	Mar	Apr	May	Jun
Acme	35,000	40,000	45,000	35,000	25,000	
AK Parker	10,000		25,000			30,000
AG Edwards		25,000		30,000		
Totals	45,000	65,000	70,000	65,000	25,000	30,000

FIG. 26

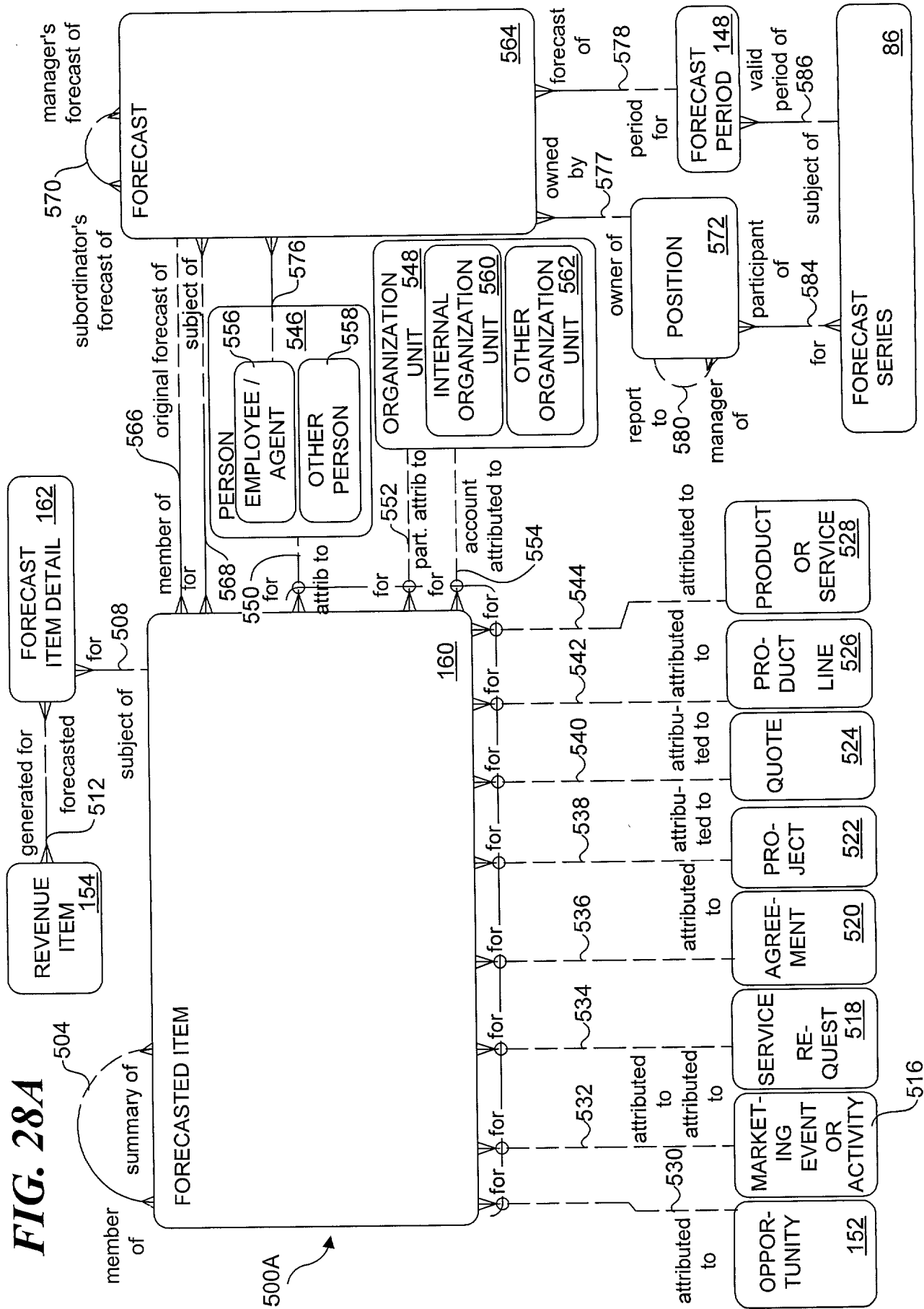
478

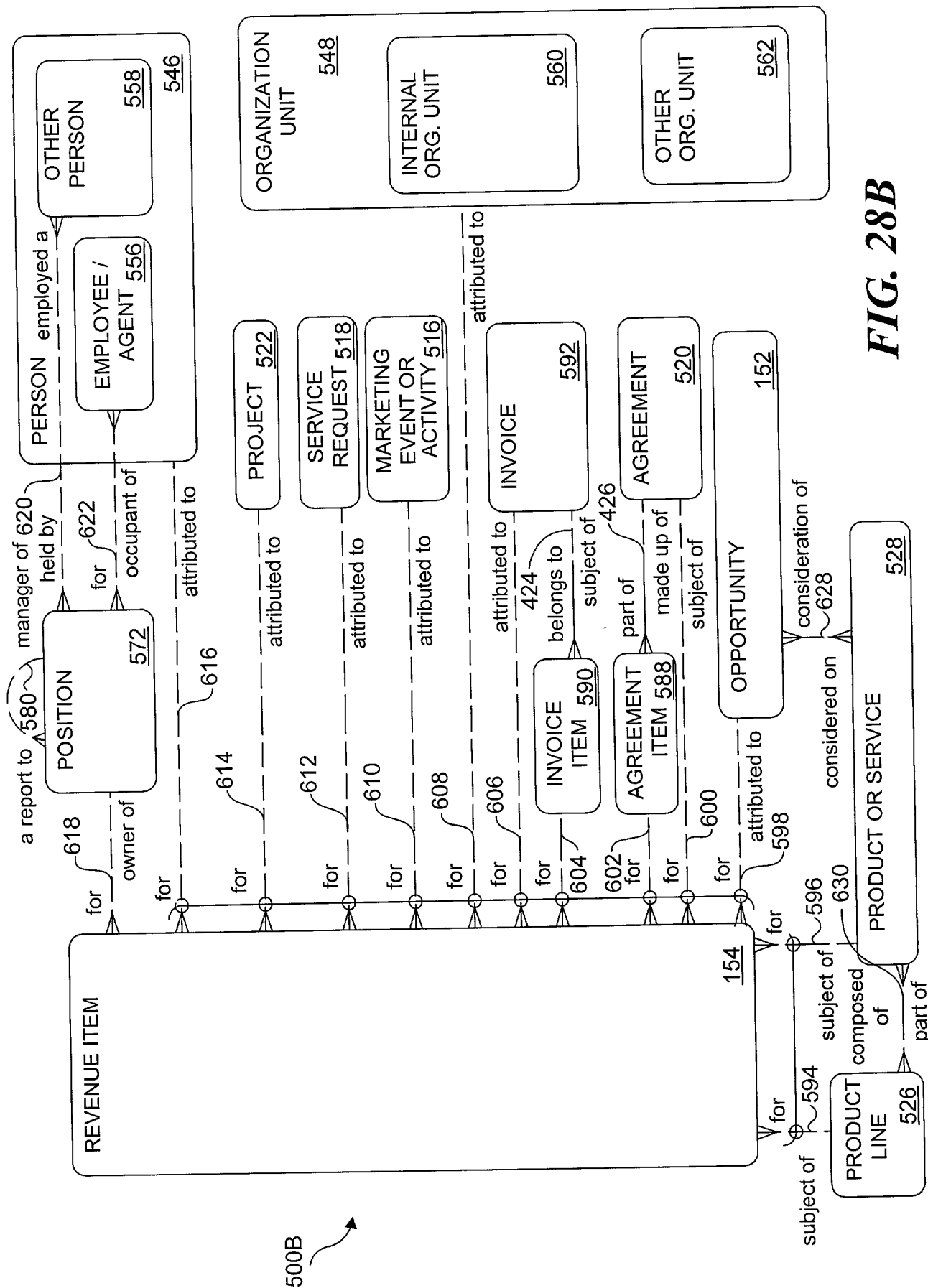
Revenues by Month, then by Account							
Account	Item	Commit	Prob	Sales Rep	Rev Cls	Rev Tp	Jan Feb Mar
Acme	Networks	✓	60%	HALACON	Bookings	Commit	65,000
	Install	✓	50%	HALACON	Bookings	Upside	50,000
	Rollout	✓	50%	HALACON		Expect	65,000
Acme Totals							65,000 115,000
AK Parker	Services	✓	50%	HALACON	Bookings	Commit	50,000
	Hardware		60%	HALACON	Bookings	Commit	65,000
	Networks	✓	60%	HALACON		Upside	25,000
	Services	✓	50%	HALACON	Billings		35,000
AK Parker Totals							75,000 100,000
...							
Grand Totals							230,000 350,000

FIG. 27

480

FIG. 28A





500B

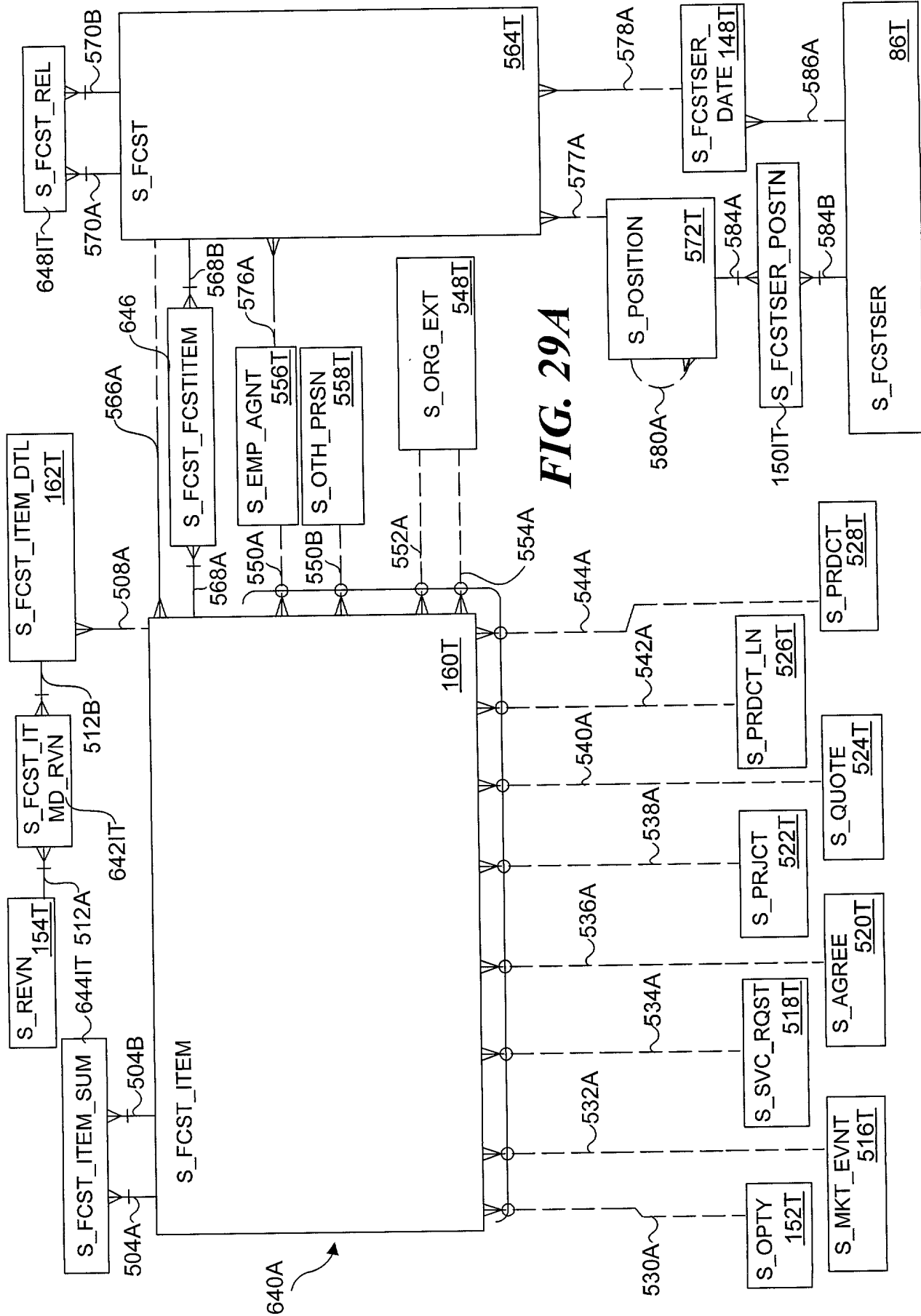
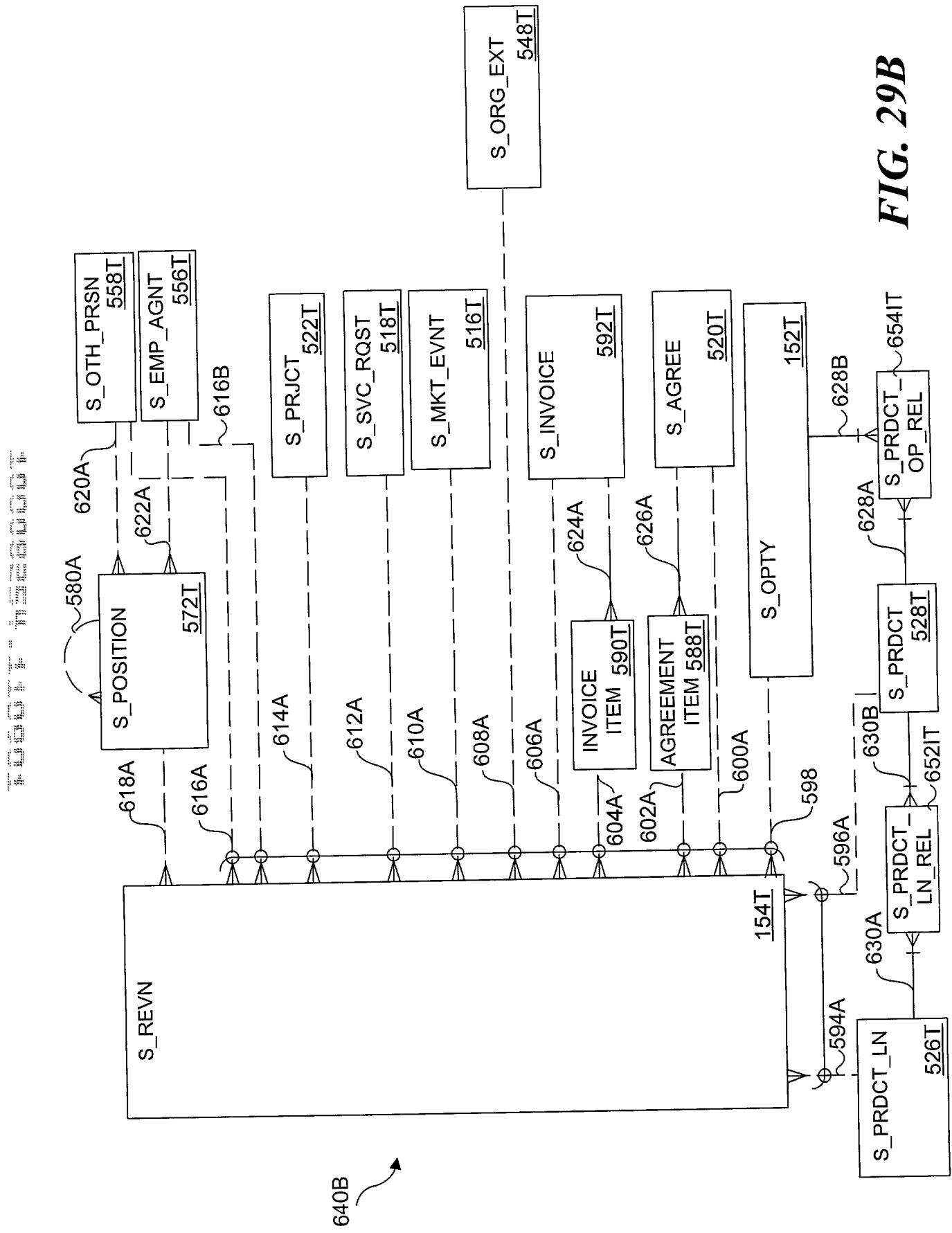


FIG. 29A



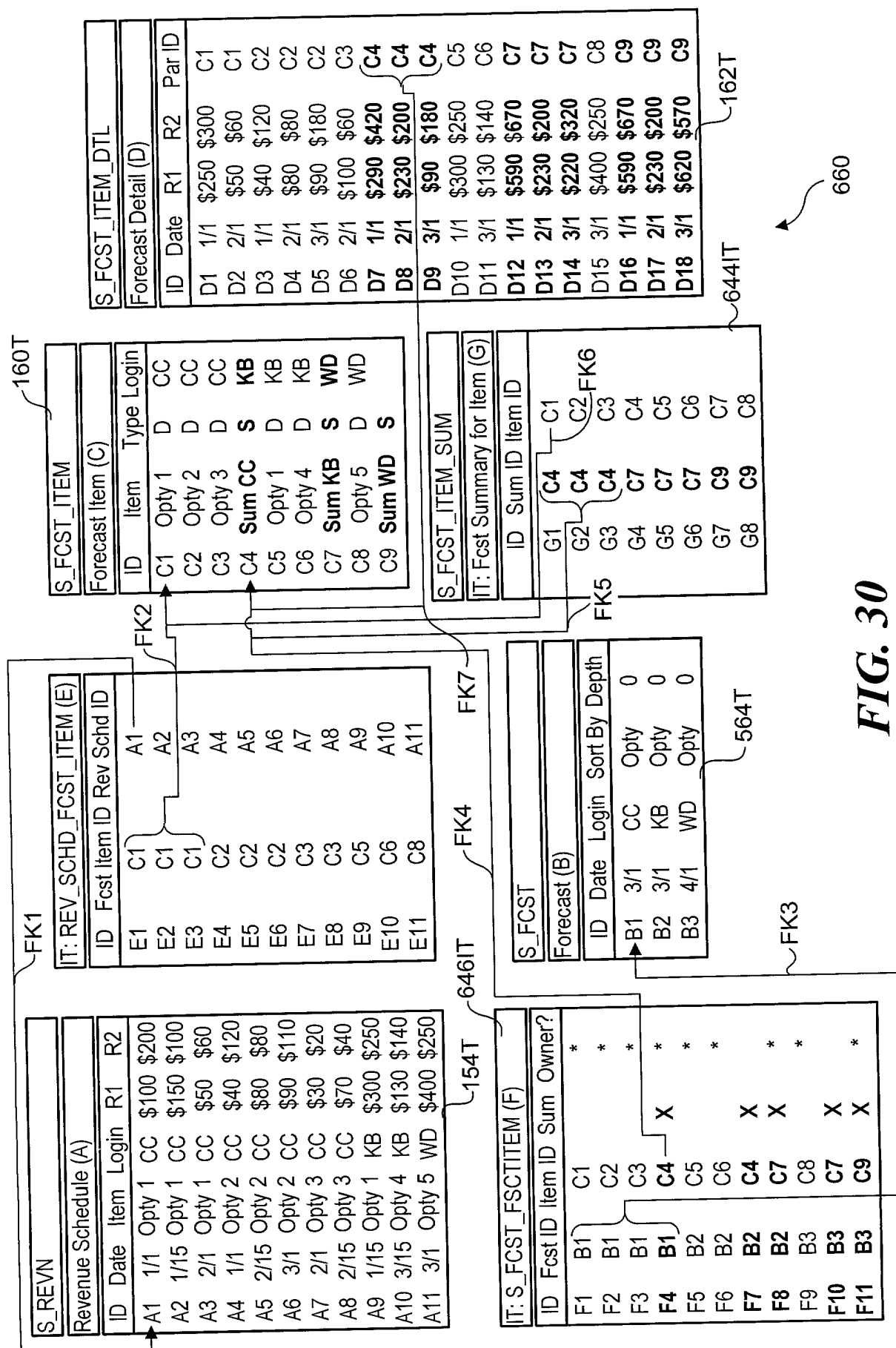


FIG. 30

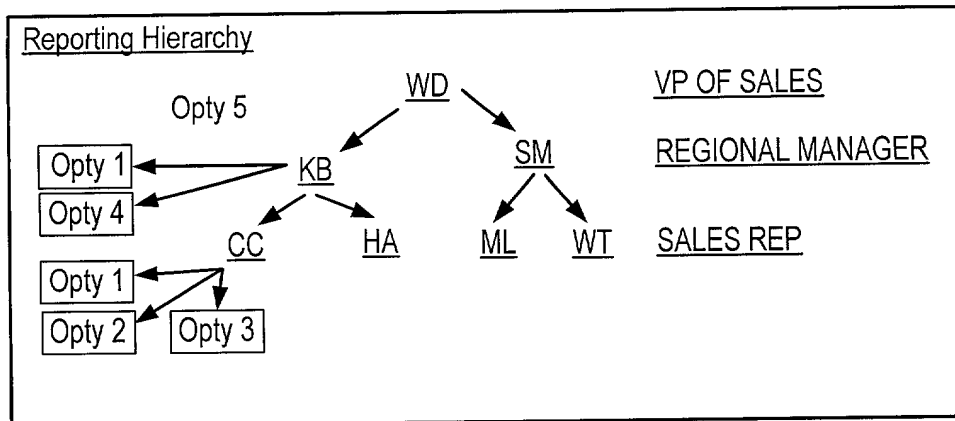


FIG. 31

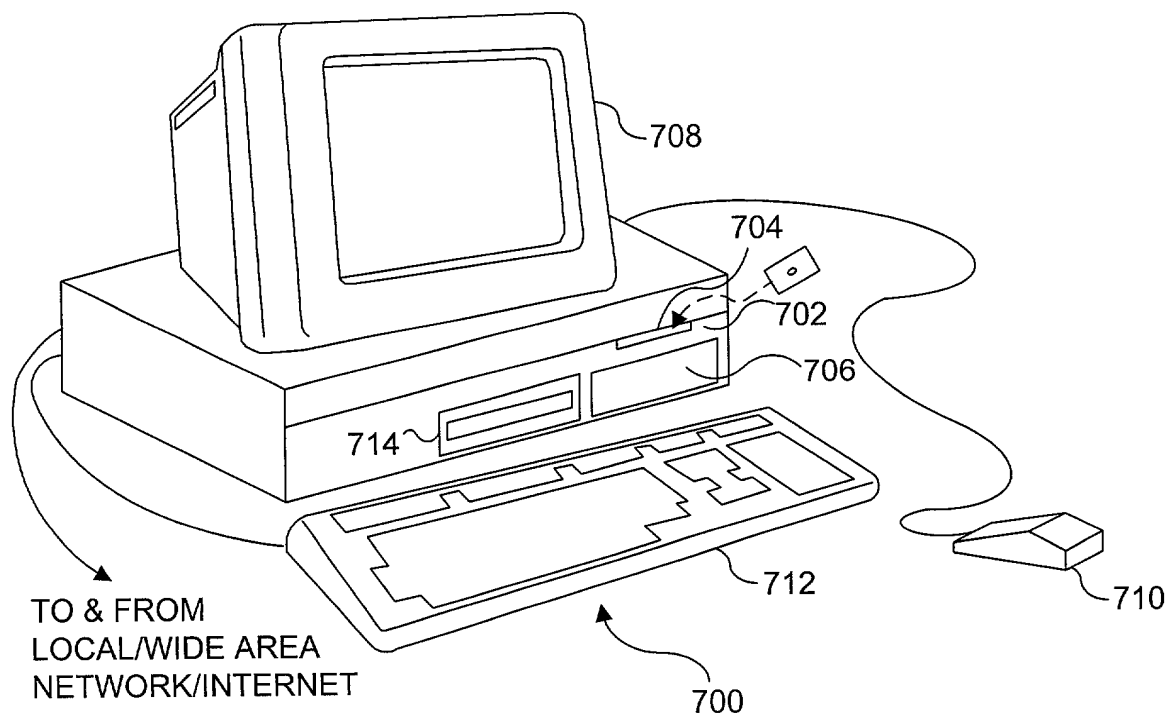
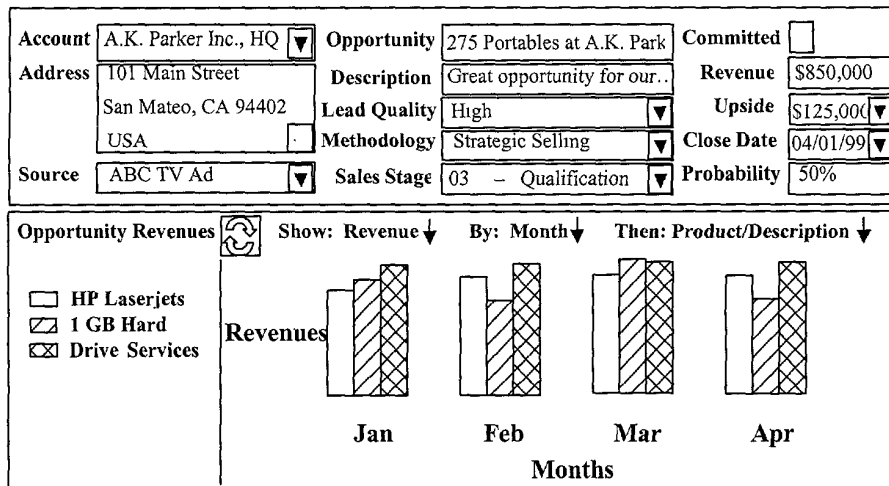
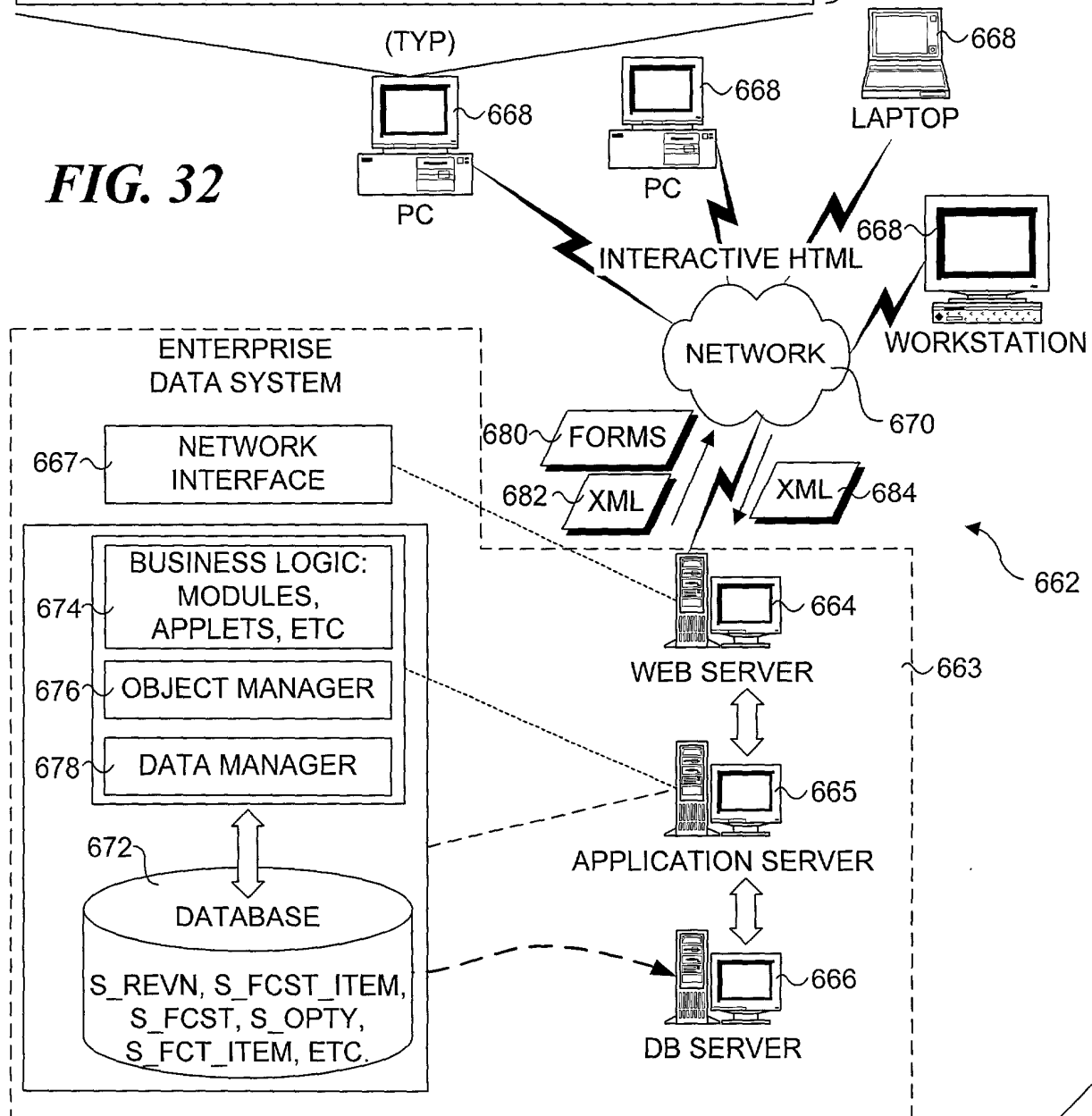


FIG. 35



210

FIG. 32



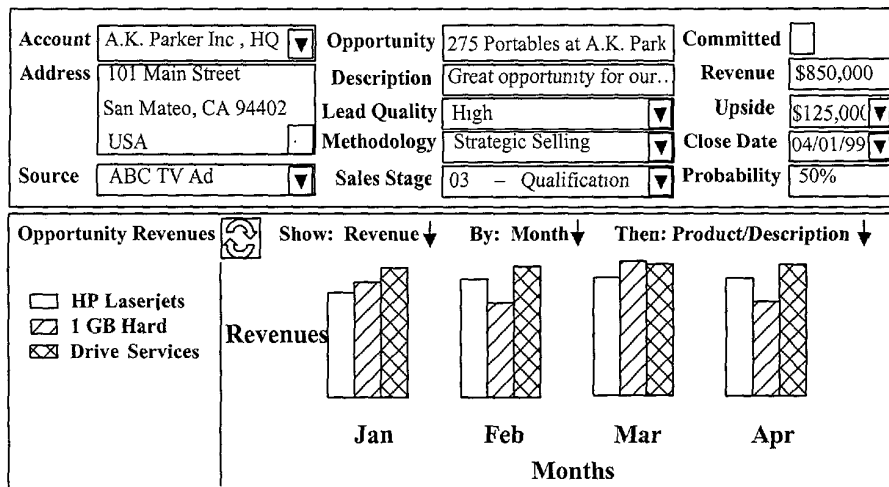
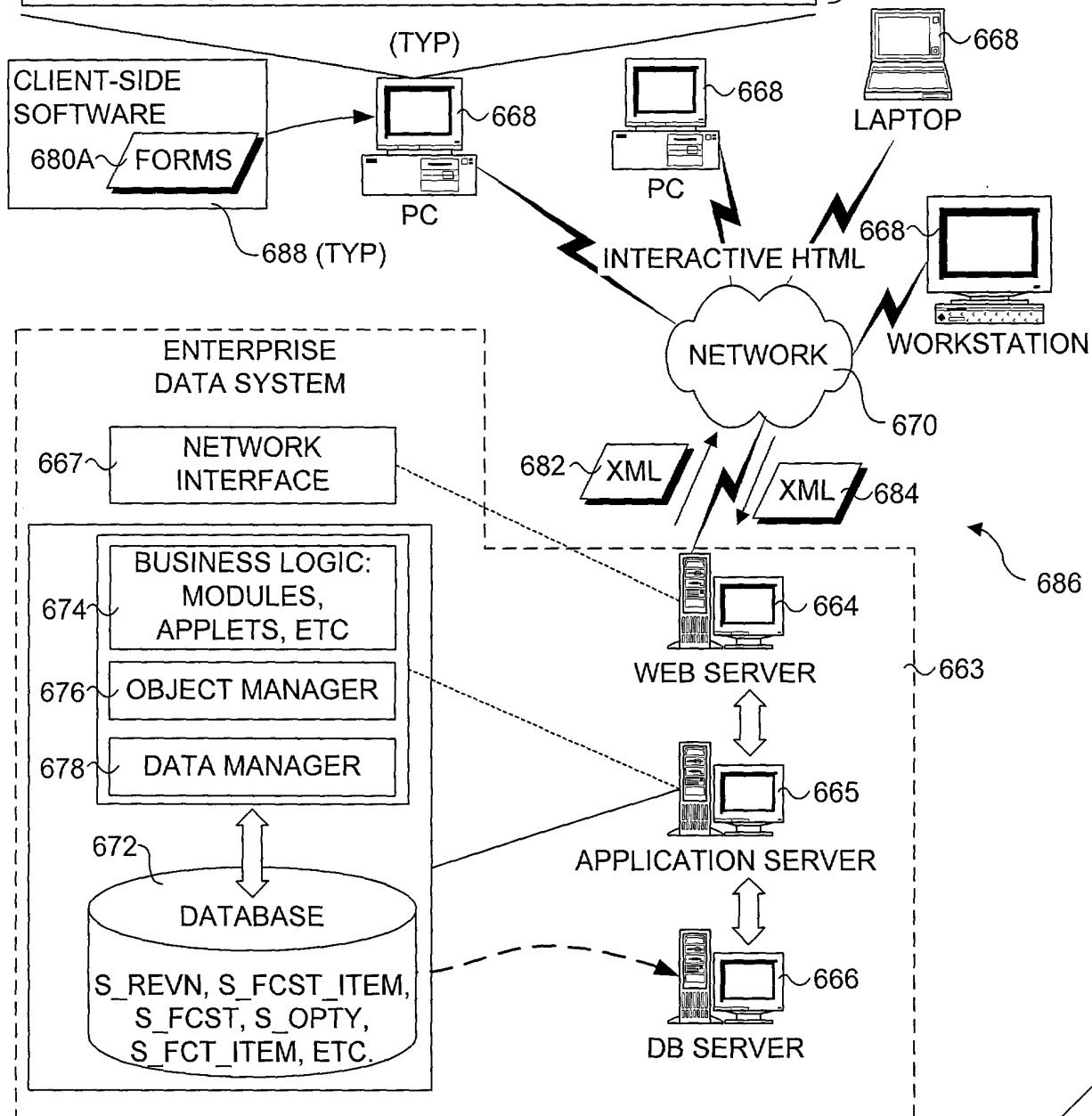


FIG. 33

210



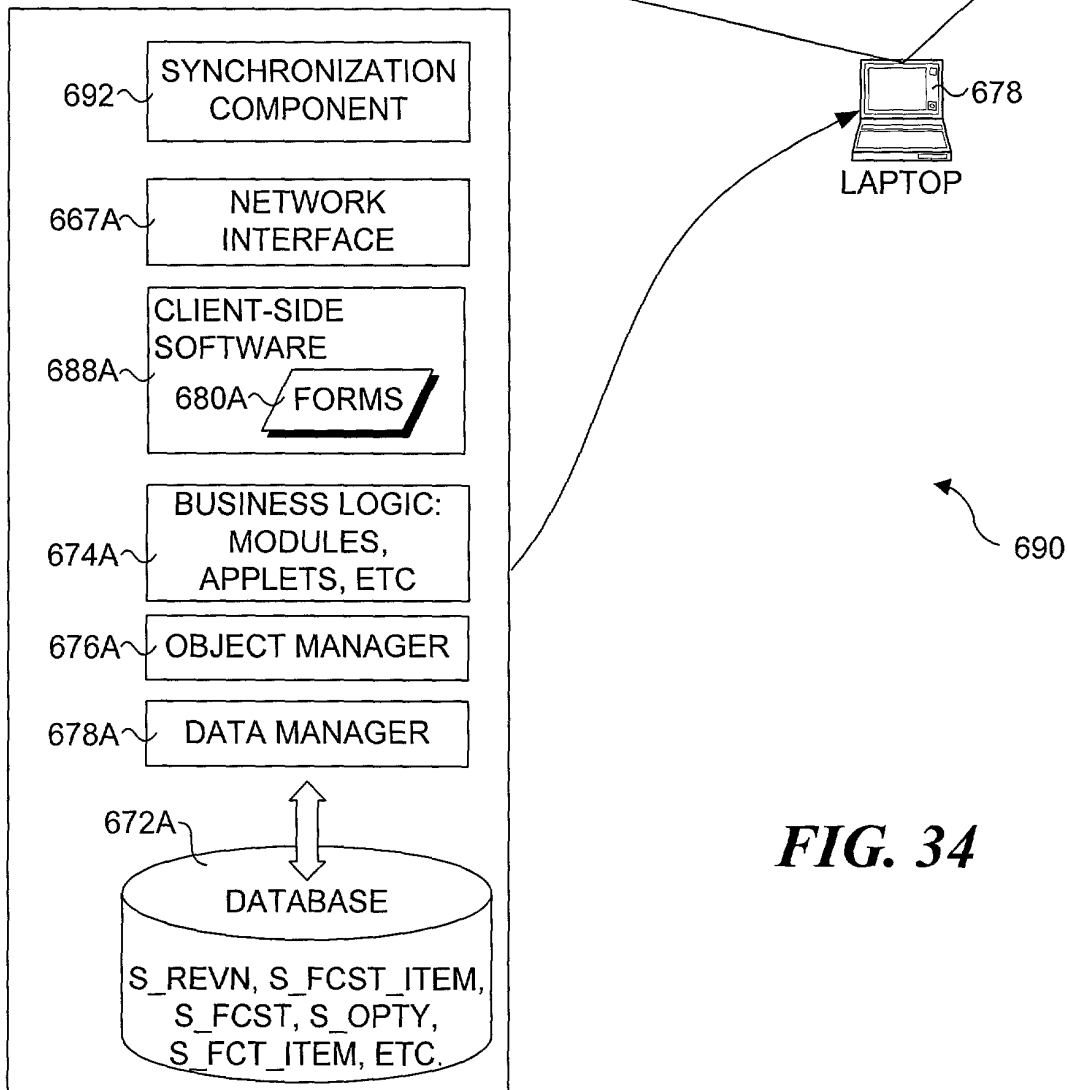
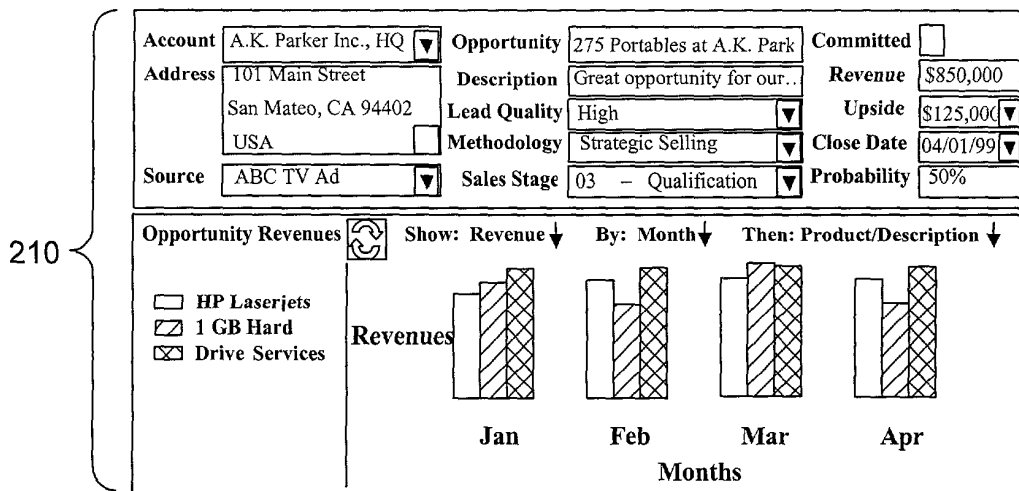


FIG. 34